

**Request for Sealed Proposal
Financial, Human Resource and Management System (HR/FMS)**

RFP OVERVIEW

Education Achievement Authority of Michigan (EAAM) <http://www.michigan.gov/eas> is soliciting proposals for a **Financial, Human Resource and Management System (HR/FMS)**.

It is the intention of the Education Achievement Authority of Michigan to award the contract to the company or companies that appears most advantageous to the Education Achievement Authority of Michigan (EAAM).

Contact Person(s): Rebecca Lee-Gwin, Ed.D.
Deputy Chancellor, Business/Fiscal Affairs and Operations
Email: lee-gwinr@michigan.gov
Phone: 313.456.3783

Proposals will be received NO LATER THAN 1:00 p.m. on February 8th, 2012 at Education Achievement Authority of Michigan, Attention Dr. Rebecca Lee-Gwin 3022 West Grand Boulevard, Suite 14-652, Detroit, MI 48202.

If sent by mail or couriers please mark your proposal **“Financial, Human Resource and Management System (HR/FMS).”**

Proposals may be modified or withdrawn prior to the opening of the proposals.

FAXED PROPOSALS WILL NOT BE ACCEPTED.

PRE-PROPOSAL CONFERENCE

A pre-proposal conference will be held on January 30th, 2012 at 2:00 pm at the EAAM at the address listed above.

The purpose of the meeting is to allow potential respondents the opportunity to obtain clarification of any provisions of the RFP, ask questions of EAAM staff, receive responses to written questions and receive a tour of EAAM facilities and equipment.

Attendance at the meeting is strongly encouraged, however not required.

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TERMS AND CONDITIONS

STANDARD REQUIREMENTS

1. The terms of this agreement will be mutually agreed upon.
2. EAAM reserves the right to cancel this contract without pecuniary risk or penalty upon written notice of the intent. The board reserves the right to cancel this contract upon written notice of the intent.
3. If at any time the vendor fails to fulfill or abide by the terms, conditions, or specifications of this contract, EAAM reserves the right to cancel upon thirty days written notification of the intent.
4. Vendor **MUST** provide evidence of liability and workers comp insurance with this proposal. EAAM retains the right of approval for insurance coverage.
5. The vendor shall agree to waive all right of subrogation against the EAAM, its officials, employees and volunteers for losses arising from work performed by the engineer for EAAM.
6. The vendor agrees to indemnify and hold harmless owner, its Board of Trustees, individually and in their capacities, and all employees and agents of owner, from any and all claims, actions, demands, suits, causes or otherwise, for personal injury, death or property damage, arising out of or related directly or indirectly to the project, brought by or on behalf of any person, group of persons, or legal entity.
7. EAAM accepts no obligations for costs incurred by vendors responding to this RFP or on being awarded the contract.
8. Proposers are specifically directed **NOT** to contact any EAAM Board members or personnel, other than specified personnel identified in this RFP, for meetings, conferences or technical discussions that are related to the RFP. Unauthorized contact with any EAAM Board member or personnel may be cause for rejection of the proposer's RFP response. The decision to select a proposal is solely that of EAAM.

GENERAL TERMS

Inquiries

All inquiries concerning this procurement are to be in writing and to be directed only to the EAAM Purchasing Department at the following address or by facsimile or by email:

Rebecca Lee-Gwin, Ed.D.
Deputy Chancellor, Business/Fiscal Affairs and Operations
Email: lee-gwinr@michigan.gov
Phone: 313.456.3783

Questions must be submitted in writing by January 27th, 2012. In order to receive copies of responses to questions, a vendor must submit in writing or by email a contact person and address.

Vendor Contact

Please include the name, title, address, and telephone number of the contact person for questions on your proposal.

Technical Response

Required information on the technical capabilities of the proposed software solution is detailed in subsequent sections of this RFP. A complete response to these requirements is necessary for EAAM to conduct a thorough HR/FMS and determine applicability to the EAAM needs.

Pricing Information

Proposals should include pricing information in the format included in the RFP. Additional information can also be provided, if necessary.

Non-Collusion Affidavit

The authorized person must sign a non-collusion affidavit. A fully executed copy of the required affidavit is contained in Section 4. **The original signed affidavit is to be included in the proposal in order for the proposal to be considered.**

Felony Conviction Notification

The authorized person must sign a felony conviction notification. A fully executed copy of the required affidavit is contained in Section 5. **The original signed affidavit is to be included in the proposal in order for the proposal to be considered.**

Conflict of Interest

The authorized person must sign a conflict of interest affidavit.

The original signed affidavit is to be included in the proposal in order for the proposal to be considered.

Taxes

EAAM is exempt from state, federal, and local taxes, and will not be responsible for any taxes levied on the company as a result of the contract resulting from this RFP.

Equal Opportunity

It is the public policy of EAAM, at all levels of procurement, to promote equal opportunity in employment and in contracting opportunities, and to promote and encourage the participation of Minority Business Entrises (MBEs) and Women Business Entrises (WBEs), small and other disadvantaged business entities in employment and contracting opportunities involving the State as fully as possible. The term “minority business entrise” means a business at least 51 percent of which is owned, controlled and managed by minority group members. EAAM, therefore, is committed to pursue such avenues in its employment and contracting activities which will further the goals of this policy.

Similarly, a demonstrated commitment content with the goals of this policy by those with whom the EAAM does business, including those vendors responding to the solicitation, is highly desirable by EAAM.

Assignment

The selected vendor may not reassign any award made as the result of this RFP, without prior written consent from EAAM.

Discussion of Proposals

EAAM may conduct discussions with any proposer who submits a proposal. Proposers must be available for a presentation at EAAM on specific dates if selected for software demonstrations and/or discovery (pre-contract negotiations).

Data Collection and Information

All data and information gathered by the selected vendor and its agents, including this RFP and all reports, recommendations, specifications, and data shall be treated by the selected vendor and its agents as confidential. The selected vendor and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, propaganda, and/or in another job or jobs, unless written consent is obtained from EAAM.

TERMS SPECIFIC TO THIS RFP

By virtue of submitting a proposal, the vendor making the submission acknowledges the following:

- This RFP is a request for software, implementation services, and Support. As such, proposals from implementation firms alone or software firms without an implementation mechanism will not be considered.
- Software firms may or may not partner with another vendor for purposes of implementation. However, the proposal should clearly delineate which party is responsible for what services. Should any conflicts arise during the implementation process; EAAM will hold the prime contractor, i.e., the software firm, responsible for resolution of any difficulties.
- The software firm must be the entity providing the responses to the detailed business requirements. The comment field (or a separate document, if necessary) should be used to note alternatives or provide additional information.
- Both the software and services firm (s) will be required to warrant the license and services agreement to the requirement responses.
- EAAM reserves the right to reject any or all proposals, and to waive technicalities and informalities when such waiver is determined by EAAM to be in its best interest. EAAM reserves the right to reconsider any proposal submitted at any phase of the procurement. It also reserves the right to meet with select proposers at any time to gather additional information. Furthermore, EAAM reserves the right to delete or add functionality (i.e., modules and components) up until the final contract signing.
- EAAM expects to enter into a software licensing agreement with the software firm(s) and an implementation services agreement with an implementation firm (if it is different from the software firm). If EAAM is not satisfied with the qualifications, cost, or experience of the implementation firm or any third-party solution, it reserves the right to request that the software firm implement its own software or propose a new implementation firm.
- If EAAM is not satisfied with the quality or experience of the implementation firms being proposed, EAAM also reserves the right to select the software product only as part of this procurement, and issue another RFP for implementation services. All firms submitting proposals, by virtue of doing so, are recognizing that EAAM retains this option.
- Pricing must be submitted on a "not-to-exceed" basis. Unless there is an approved change in the scope of services requested by EAAM, the selected vendor will provide all services within the agreed upon price for both software and implementation services. Where the vendor cannot specifically identify a cost for service, the vendor should explain how this area or areas will be defined before a contract is entered into between EAAM and the vendor.
- Proposals and pricing, once submitted, may not be withdrawn for a period of 120 days from the date of the proposal submission requirement included in this RFP.

When responding to this RFP, please follow all instructions carefully. Please arrange and submit proposal contents in the following order:

Proposal Element	Description/Information to be Included
Title page	Name of firm or firms issuing the proposal.
Letter of transmittal	<ul style="list-style-type: none"> Signed by someone able to commit the firm, or firms, to the specified work and costs. Brief understanding of the key points of the proposal and why EAAM should select the vendor.
Table of contents	Listing of each proposal element and page number.
Executive summary	No more than five pages summarizing the key elements of the proposal.
Company background	Brief history of the firm and each subcontractor. Required financial stability information should be included here along with any proof of insurance requirements.
Proposed optimal software and hardware solution to meet EAAM needs	Detailed list of software, both and any third-party or optional software, being proposed and any required hardware.
Technical requirements	Responses to the sections of technical requirements. Any exceptions should be noted in this section.
Implementation plan	Milestones necessary to meet the date for having the system fully functional.
Training plan	Identification of training options and costs and number of users to be included for training in each option.
Maintenance and technical support	Brief description of how the software solution will be supported.
Proposed project team members	A brief description of key project team members and their experience on similar projects. Resumes should be included for all key position.
References	See earlier description of information to be included.
Cost/pricing proposal	Detailed list of costs using format described in the RFP.

Failure to follow these instructions may be considered an unresponsive proposal and may result in immediate elimination from further consideration.

SUBMISSION OF PROPOSALS

EAAM Purchasing Department must receive all proposals at the address listed on page one of this RFP no later than **11:00 a.m. on February 8th, 2012 Eastern Time**. Each respondent should provide one (1) original bound signed, written copy of their proposal. One additional electronic version should also be provided. The electronic version is for the convenience of EAAM and does not supersede the vendor's requirement to provide a written, original copy by the designated date and time.

Submission Requirements

In order to facilitate the responses to this RFP, proposers are required to prepare their proposals in accordance with the instructions outlined in this RFP.

Signature of this proposal by the proposer constitutes acceptance by the proposer of terms, conditions and requirements set forth in the RFP.

Minor exceptions may not eliminate a proposal. Any exceptions to the specifications established in this RFP shall be listed in detail on a separate sheet and attached to the proposer's response. EAAM shall determine whether any exception is minor.

Proposals not conforming to the instructions provided in this RFP will be subject to disqualification at the sole option of EAAM.

Withdrawal of Proposals

Responses to the RFP may be withdrawn by written notice received prior to the due date and time specified for receipt of the proposal.

Confidential Information

The proposal submitted in response to this request may contain technical data that a proposer does not want used or disclosed for any purpose other than evaluation of the proposal. If any of the information is considered to be proprietary or a trade secret belonging to the proposer, and if released, would give advantage to a competitor or other proposers, that information should be filed with the proposal in a separate envelope marked "CONFIDENTIAL - DO NOT DUPLICATE WITHOUT PERMISSION."

This restriction does not limit the right of EAAM to use or disclose technical data obtained from another source without restriction. This restriction also does not apply EAAM's right to disclose technical data to the internal selection team, including any consultant hired by EAAM to as Financial and Human Resource System with the software evaluation and selection process.

EAAM assumes no liability for disclosure or use of unmarked technical data or products and may use or disclose the data for any purpose and may consider that the proposal was not submitted in confidence and therefore is releasable. Price and cost data concerning salaries, overhead, and general and administrative expenses are considered proprietary information and will not be disclosed.

Proposal and Presentation Costs

Those submitting proposals do so entirely at their expense. There is no expressed or implied obligation by EAAM to reimburse any individual or firm for any costs incurred in preparing or submitting proposals, for providing additional information when requested by EAAM or for participating in any selection demonstrations or interviews, including discovery (pre-contract negotiations) and contract negotiations.

OVERVIEW AND GENERAL INFORMATION

Introduction

While every effort has been made to ensure the accuracy and completeness of the information in this RFP, EAAM recognizes that the information is not exhaustive in every detail and that all work and materials may not be expressly noted in these specifications. Consequently, it is the responsibility of the respondent to include in the proposed solution all hardware, software and materials which are necessary for the full and faithful performance of the system requirements in accordance with the objectives of EAAM.

The solution proposed must be complete in every respect (unless otherwise noted by in the response), including all design, components, recommendations for equipment and required maintenance and licensing.

The proposed solution should describe in detail all features and capabilities of the proposed application software using the format in this RFP. Additional features and/or capabilities not requested by EAAM but included with the proposed solution should be described separately. Any additional requirements or costs for the additional features or capabilities should also be included.

The proposed solution should provide a timeline for implementation with specific milestones for evaluation and payment by EAAM. The proposed solution should describe the vendor's expectations for support/as per EAAM personnel and the timeframe within which such support shall be provided.

The proposed solution should recommend frequency of status/progress meetings and format of status reports to be provided to EAAM at such meetings.

The respondent should include warranty provision for repair of manufacturer defects in hardware and software for the life of the system.

Overview

The Education Achievement Authority of Michigan (EAAM) requests proposals from qualified firms for software and implementation services for Financial and Human Resource System to be provided in accordance with terms, conditions and specifications established in this request for proposals.

EAAM is soliciting proposals for a comprehensive solution to its entire set of functional requirements that not only meets the requirements set forth in this RFP but is also flexible and scalable in order to meet its future business and technology needs.

The RFP includes requirements for all areas encompassing student information and reporting (e.g., student records, registration, schedule, testing, grades and attendance).

About the Education Achievement Authority of Michigan

The Education Achievement Authority of Michigan is a new statewide school system that will operate the lowest performing 5 percent of schools in Michigan not achieving satisfactory results on a redesign plan or that are under an emergency manager. It is designed to provide a new, stable, financially responsible set of public schools that create the conditions, supports, tools and resources under which teachers can help students make significant academic gains. It will first apply to under performing schools in Detroit in the 2012-2013 school years and then be expanded to cover the entire state.

EAAM will initially be acquiring 30 schools with close to 30,000 students and over 1,000 employees. Additional key information is provided in **Exhibit 1**.

Exhibit 1

Key EAAM Projections

Indicator	Information
Student Enrollment	30,000
Operating Budget	\$42,000,000.00
Capital Budget	\$1,500,000.00
Total Employees	1032
Teachers	1000
Principals and Assistant Principals	34
Nurses	25
Counselors and Diagnosticians	35
Other Campus Personnel (e.g., clerks, aides)	83
Central Administrative Personnel	15
Food Service Employees	75
Transportation Employees	N/A
Maintenance and Custodial Employees	75

EAAM operates with the fund structure described in **Exhibit 2**.

Exhibit 2

EAAM Fund Structure

Fund Types	Number of Individual Sub-Funds
General Fund	
Special Revenue Fund	
Bond Fund (Capital Projects)	
Debt Service Fund	
Internal Service Fund	
Enterprise Funds	
Trust Funds	
Agency Funds	
Fixed Asset Funds	
Long-Term Obligations Fund	

CURRENT ORGANIZATION AND OPERATING ENVIRONMENT

This would be a new implementation for EAAM with no prior or existing system/s.

Exhibits 3 through 8 provide additional projected information about the EAAM's planned operations and workload to be considered by vendors when preparing a proposal and cost estimate.

Exhibit 3 Budget Information

Indicator	Information
Operating Budget	\$ 77,000,000.00
Special Revenue Budget	\$ 20,000,000.00
Debt Service Budget	\$ 10,764,203.00

Exhibit 4 Human Resources/Payroll Information

Indicator	Information
Exception Pay Employees	10 by checks
Payroll Direct Deposits	1313
W-2's Issued	1864
Substitute Teachers	280

Exhibit 5 Fixed Asset Information

Indicator	Information
Inventory Items	
Capital Assets	

Exhibit 6 Accounts Payable Information

Indicator	Information
Number of Vendors	
Number of Invoices for 2011/2012	
Number of Checks Issued	

Exhibit 7 Purchasing Information

Indicator	Information
Number of Purchase Orders for 2012	
Number of Purchase Orders YTD for 2012	
Number of Requisitions for 2012	
Number of Requisitions YTD for 2012	

Exhibit 8 Project/Grant Information

Indicator	Information
Total Number of Grants for 2012	
Total Number of Grants in Progress for 2012	
Total Number of Construction Projects for 2012	
Total Number of Construction Projects in Progress for 2012	
Total Number of Technology Projects in Progress for 2012	

CURRENT TECHNICAL ENVIRONMENT AND PREFERENCES**Hardware**

EAAM does not have any current hardware.

Operating System software

EAAM does not have any current operating system or system software.

Stand-Alone Software/Probable Interfaces

Exhibit 9 describes EAAM's stand-alone software that will require interface with the proposed components in Exhibit 9 below.

Exhibit 9 Probable Interface Software

Application	Description	File Format
Business/HR system/Time and attendance	N/A	MS-SQL
Cafeteria Food System	N/A	MS-SQL
Transportation routing system	N/A	MS-SQL
Textbook/Library/Inventory	N/A	MS-SQL

Proposers should identify the ability of their proposed solution to integrate with current software or propose an alternative.

The proposed solution should describe the relational database management system that will be provided.

The database must have export capability to Microsoft SQL, Microsoft Access, Excel and or delimited text files in ASCII format or in other formats as noted in the specifications.

The proposed solution should also list any additional software required to support the proposed solution.

EAAM prefers software that is standards-based and does not lock EAAM into proprietary technology. Also, EAAM would need web ready and GUI-based applications running in a client-server environment. Applications must be user-friendly and table driven and be able to use the EAAM Ethernet TCP/IP network.

PROJECT SCOPE AND REQUIREMENTS

The EAAM is considering employing one of two systems designs, therefore two different scenarios will need to be submitted: a Vendor Hosted ASP model, and another model is where Financial and Human resource System is installed locally on EAAM servers.

Vendor Hosted Service will include:

- 1) Guaranteed System 99.93% uptime or better.
- 2) Guaranteed all backups, and restore with 0.0% data loss.
- 3) Vendor required staff to manage and support system 24/7.
- 4) Provide test server/s for running scenarios before live implementation.
- 5) Software configuration.
- 6) Server maintenance and support.
- 7) Product technical support.
- 8) Software upgrades to ensure timely access to the newest solution capabilities.

EAAM Centralized Hosting:

Vendor will provide the following services at EAAM designated site

- 1) Guaranteed System 99.93% uptime or better.
- 2) Guaranteed All backups, and restore with 0.0% data loss.
- 3) Staff
 - a. Certified Microsoft Network Engineers
 - b. Certified Microsoft SQL Administrators, including expert level of data mining and business intelligence
 - c. Certified PMP Project manager
 - d. HR/FMS subject matter expert to act as trainer
 - e. HR/FMS Product Experts
- 4) Software configuration.
- 5) Server maintenance and support.
- 6) Database backups.
- 7) Product technical support.
- 8) Software upgrades to ensure timely access to the newest solution capabilities.

- 9) Microsoft Windows Server 2008 R2 as its operating system, and Microsoft Database and Business intelligence information management platforms

The purpose of the RFP is to provide interested proposers with sufficient information to enable them to submit proposals to supply application software that will fulfill the specified information processing needs of EAAM. The scope for the system functions includes, however not limited to:

- General technical requirements
- General ledger accounting
- Budget preparation and monitoring
- Purchasing
- Fixed assets
- Accounts payable
- Accounts receivable
- Payroll and tax related deductions
- Project/grant accounting
- Work order
- Inventory
- General human resources requirements
- Applicant tracking
- Benefits and its administration
- Workforce management and recruitment
- Manage compliance risk
- Time and attendance; including shift differential, additional assignments, and special payroll calculations for all staff, (e.g. full time teachers, part time teachers, substitute teachers, support staff, custodian staff, administrative staff, etc)
- Touch terminals with biometric verification capabilities
- Student / Staff ID printing

In addition to software module costs, proposals must also include detailed implementation, maintenance and training costs.

EAAM seeks to implement a software package that requires little or no customization but allows for a high degree of flexible configuration. The goal would be to limit the amount of modification to the base application. EAAM also desires a system that includes development tools that will enable EAAM to meet its future needs without becoming heavily dependent upon programmer consultants.

In order to be considered for selection, a proposer must address every section of functional requirements noted above. Failure to address the set of requirements may result in a proposal being assessed as "unresponsive" and may result in its elimination from further consideration. Additional proposal instructions are described later in this document.

Project Timeline

EAAM requires the selected vendor to begin implementation of the new system by March 26th, 2012. The Education Achievement Authority of Michigan would like the system to be

fully functional, and all appropriate EAAM staff fully trained, by May 4th, 2012.

Licensing

The proposed solution must provide a full description of all licensing conditions to include system upgrades and the terms under which future users may be added. The proposed solution should also define licensing terminology, such as “user/s” (e.g., concurrent, seats).

System Security

The proposed solution should describe in detail security controls to govern usage by various levels of EAAM personnel and to prevent unauthorized use of the database. This description should at a minimum describe how access to the database is restricted, maintenance of database process controls and logging of all transactions.

Conversion of Existing Data

The proposed solution should also identify the time and costs necessary, if any, to convert existing information to the proposed application software. Involvement of EAAM personnel should be described and an estimate of time required of EAAM personnel should be included.

Training

The proposed solution should include a description of the recommended training required to have a full, working knowledge of the application software. The proposed solution should identify which EAAM personnel should be included in the training. If there is a maximum number that can attend the training that should be stated.

If there are options regarding the amount of training, the proposed solution should distinguish the advantages of each successive option.

The location of the training should be included if not at EAAM.

Maintenance and Technical Support

The proposed solution should specify the provisions and cost of the post-implementation maintenance support contracts available to EAAM, including any initial support period that is included in the price in the respondent’s proposal.

Upgrades at no additional cost must be included in the maintenance contract.

The proposed solution should describe EAAM’s ability to obtain source code, and any costs, in the event that the manufacturer discontinues the product or product support with no successor or in the case of manufacturer breach of contract.

The proposed solution should describe alternatives associated with technical support, such as on-site, telephone hotline or modem access. Costs and typical response time associated with each option should be identified. If specific types of technical cost are included in maintenance contracts, the type of support should be identified and quantified.

User Groups and Meetings

The proposed solution should identify the respondent's use of user groups locally, regionally and/or nationally as a source of user interaction and potential application software upgrades or modifications. Within the State of Michigan area users similar to EAAM (i.e., school EAAM's of similar enrollment and complexity of operations) should be included in the response.

Longevity and Financial Stability

EAAM is interested in identifying a proposed solution that is supported by a vendor or vendors with demonstrable staying power both in terms of length of existence and in financial strength.

The respondent must include for the prime contractor and all subcontractors, a history of the firm, an approximate number of clients with similar installations or for whom similar work has been performed and a list of current officers of the firms and their tenure with the firm. For selected finalists in the process, EAAM may request detailed information to support any of these points.

A summary of audited financial information (i.e., balance sheet and income statement) should be included with the response. In the absence of audited financial statements, financial compilation certified by an external third-party certified public accountant, should be included.

For selected finalists in the process, EAAM may request detailed information to support this summary information. EAAM may also request the name of the respondent's financial institution and contact for verification of financial strength.

All financial information will be treated as confidential.

EVALUATION AND CONTRACT AWARD TIMEFRAME

Exhibit 4 provides the EAAM current estimated schedule for selection of a vendor.

Exhibit 4 Planned Schedule

Date	Activity
January 10 th , 2012	RFP released by Education Achievement Authority of Michigan
January 27 th , 2012	Deadline for submission of questions regarding the RFP
January 30 th , 2012	Pre-proposal conference
February 8 th , 2012	Proposals due – 1:00 PM Eastern Time
February 17 th , 2012	Software demonstrations by selected vendors
February 27 th , 2012	Site visits by EAAM personnel to one or more installations of highest rated vendor
March 6 th , 2012	Final evaluation of vendors and selection of finalist
March 26 th , 2012	Implementation of Financial and Human Resource system commences
May 4 th , 2012	GO LIVE

REFERENCES, SOFTWARE DEMONSTRATIONS AND SITE VISITS

The proposed solution should include at least three references of organizations, preferably Michigan school EAAMs of similar size and complexity to EAAM. The reference information should list the name of the organization, a contact name and telephone number, the date the proposed solution was installed, the number of accounts in the system and any other relevant data.

Software Demonstrations and Site Visits

Proposer demonstrations and site visits to vendor installations are both integral parts of the selection process. Up to three vendors will be selected to conduct demonstrations of the proposed software.

If a vendor is selected for a software demonstration, additional information will be requested at that time, including: project manager and team; experience of the manager and team with similar installations, especially in Michigan; and best-and-final cost offer.

Each vendor will be given one-half day to demonstrate their software to the evaluation group of EAAM staff. During these demonstrations, vendors will be free to discuss/demonstrate the functionality of their software in whatever method the vendor feels is most advantageous. EAAM staff will ask questions, as necessary, to clarify proposal responses or issues presented in the demonstrations.

Following the software demonstrations, EAAM will rank each vendor. The highest rated vendor will be contacted prior to site visits to inform them of the intent to conduct such

visits and for assistance in facilitating access to the current user (s). EAAM will then arrange visits to one or more of the sites.

It is EAAM's intent to conduct at least two site visits of installations of the proposed solution. The respondent should include at least two current users (i.e., organization, contract name and telephone number, date of installation) of the proposed solution, one of which preferred to be in Michigan. In the evaluation process, it is the intent of EAAM to give additional preference to a proposed solution with one or more installations that available in EAAM service locations

EVALUATION CRITERIA

An EAAM evaluation group comprised of staff in each of the functional areas will review all proposals received as part of a documented evaluation process. This evaluation will be conducted using the criteria in **Exhibit 5** as a guide.

Exhibit 5: Evaluation Criteria

Evaluation Criteria	Weight
Thoroughness of response and capability of proposed solution to meet EAAM's needs	25 percent
Cost, both initial and ongoing, and project timeframe	20 percent
Current user information, including: satisfaction \with product, training and support; proximity to EAAM and number of installations in the area; and effective use of user groups	15 percent
Training	20 percent
Maintenance and technical support	15 percent
Respondent longevity and financial stability	5 percent

EAAM reserves the right to determine the suitability of proposals on the basic and Human Resource System of any or all of these criteria.

Evaluation of responses to written proposal. The evaluation committee will rate the Vendors' written RFP responses leading to a 'functional numerical rating' for each Vendor. This work will result in no more than three finalists. The short list of finalists will matriculate to the evaluation of formal demonstrations of the Student Software products.

Each component of the RFP will be **normalized to a maximum of 100** points. **Each RFP** will be scored and weighted based upon the following maximum points:

Evaluation Criteria	Maximum Points
• Price	35
• Vendor References	15
• Technical Questionnaire & HR/FMS Specifications	50
• TOTAL	100

Evaluation of the Vendor Demonstration – Functional Criteria. Vendors on the short list may be contacted by EAAM to prepare for a Student Information System product demonstration. Each finalist may be asked to provide multiple in-depth presentations. The number and length of demonstrations will be determined in consultation between EAAM and the Vendors.

The HR/FMS demonstrations will consist of formal in-depth presentations. A list of questions to be covered in presentations shall be provided to the Vendor finalists prior to the demonstration by the Vendor.

At the initial software product demonstration, the various members of the evaluation committee will rate the software on their Functional Criteria.

Evaluation-Functional Criteria	Maximum Points
• Price	35
• Vendor References	15
• Vendor Demo	
Ease of use: System allows users to find what they need and use by themselves	10
Comprehensive features: The extent which the HR/FMS features match EAAM needs	20
Efficiency savings: extent to which the perspective HR/FMS streamlines existing processes	10
Customization: extent and ease to which fields, forms and reports are customized	10
• TOTAL	100

Additional Local Preference Evaluation Points. Vendors who believe they are eligible for local preference evaluation points must submit documentation showing clearly that their principal place of business is located in the EAAM boundaries, vendors that are located in those areas may be eligible to receive the following additional local preference evaluation points from one point to a maximum of 10 points:

• Vendors whose principal place of business is located in the EAAM Serving Schools	5
• Vendors whose principal place of business is located in the State of Michigan	3
• Vendors whose principal place of business is located in County of EAAM Serving Schools	1

• Vendors whose principal place of business is located in the state of Michigan	1
• Total Points for local preference	10

COST/PRICING FORMAT

The proposed solution must itemize all discrete costs of purchasing the application software, additional software, hardware, licenses, maintenance contracts, technical support, training and the like. Where options are available, such as different training alternatives, the price of each option should be clearly identified.

All costs should be identified as either recurring or one-time. If a cost is for a period of time, such as a maintenance contract, the length of the period included in the proposed solution should be identified and the entire cost for that period should be included.

Pricing information should include the following cost elements at a minimum and, preferably be in a similar format. The cost/pricing should be submitted with the proposal.

Cost Element	Proposed Amount
Base software license fees	
Software modification costs to meet EAAM requirements (*)	
Third-party software, if applicable	
Implementation services	
Data conversion and interfaces	
Training	
Travel and other support costs	
Hardware costs, if applicable	
Five-year maintenance cost by year	
Other costs (please be specific)	

() Please identify the cost of each modification to the base software. EAAM reserves the right to waive a requirement based on cost information.*

SECTIONS OF THE TECHNICAL REQUIREMENTS

The technical requirements section of the RFP contains 15 separate sections for response:

- General technical requirements
- General ledger accounting
- Budget preparation and monitoring
- Purchasing
- Fixed assets
- Accounts payable
- Accounts receivable
- Payroll
- Project/grant accounting
- Work order
- Inventory
- General human resources requirements
- Applicant tracking
- Benefits administration
- Time and attendance

Vendors must respond to each number item using the following alternatives, which are located at the bottom of each page:

A - The current release of the software supports this specification. This feature is currently installed and in successful operation at one or more of the vendor's customer sites.

B - This specification is supported but not exactly as stated. Provide explanation in the comment section.

C - This specification is not currently in operation at a customer site but will be included as a part of the release to be installed as a result of this RFP.

D - This specification is not currently supported. The necessary modifications required to meet the specification will be provided at no cost to EAAM. Comments must be included to indicate the time frame required to provide the modification.

E - This specification is not currently supported. The necessary modifications required to meet the specification will be provided at an additional cost to EAAM. Comments must be included to indicate the cost and time frame required to provide the modification. Modification costs must also be included in the cost summary section of the response.

X - This specification is not supported, and no modifications will be provided.

NON-COLLUSIVE BIDDING CERTIFICATE

- A. By submission of this proposal, the bidder certifies that:
- B. This bid or proposal has been independently arrived at without collusion with another bidder or with any competitor;
- C. This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other bidder, competitor or potential competitor;
- D. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a proposal;
- E. The person signing this bid or proposal certifies that he/she has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the bidder as well as to the person signing in its behalf.
- F. **THE FAILURE TO SIGN THIS CERTIFICATE MAY BE CAUSE FOR YOUR BID TO BE REJECTED.**

Company Name

Authorized Signature

Title

CRIMINAL CONVICTION**FELONY CONVICTION NOTIFICATION**

State of Michigan Legislative Senate Bill No. X, Section XX.XXX, Notification of Criminal History, Subsection (a), states “a person or business entity that enters into a contract with a school EAAM must give advanced notice to EAAM if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.”

Subsection (b) states “a school EAAM may terminate a contract with a person or business only if EAAM determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in a conviction. EAAM must compensate the person or business entity for services performed before the termination of the contract.”

I, the undersigned agent for the firm named below, certify that the information concerning Notification of felony convictions has been reviewed by me and the following information furnished is true to the best of my knowledge.

Vendor’s Name: _____

Authorized Company Official’s Name (Printed): _____

- A. My firm is a publicly-held corporation; therefore, this reporting requirement is not applicable.

Signature of Company Official: _____

- B. My firm is not owned nor operated by anyone who has been convicted of a felony:

Signature of Company Official: _____

- C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon(s): _____

Details of Conviction(s): _____

Signature of Company Official: _____

CONFLICT OF INTEREST QUESTIONNAIRE

Any person or entity who contracts or seeks to contract with EAAM for the sale or purchase of property, goods, or services as well as agents of such persons, (hereafter referred to as Vendors) are required to file a Conflict of Interest Questionnaire with EAAM. Each covered person or entity who seeks to or who contracts with EAAM is responsible for complying with any applicable disclosure requirements.

The Conflict of Interest Questionnaire must be filed:

- No later than the seventh business day after the date that the Vendor begins contract discussions or negotiations with the government entity, or submits to the entity an application, response to a request for proposal or bid, correspondence, or other writing related to a potential agreement with the entity.
- The Vendor also shall file an updated questionnaire no later than September 1 of each year in which a covered transaction is pending, **and** the seventh business day after the date of an event that would make a statement in the questionnaire incomplete or inaccurate.

Completed forms should be sent to:

Rebecca Lee-Gwin, Ed.D.
Deputy Chancellor, Business/Fiscal Affairs and Operations
Email: lee-gwinr@michigan.gov
Phone: 313.456.3783

The Local Government Officers of the Education Achievement Authority of Michigan are:

Board of Governors EAA:

Chancellor: John Wm. Covington, Ed.D.

**TECHNICAL
REQUIREMENTS**